State of Delaware

Request for Information (RFI)

Delaware Talent Management System

Issued November 2008

Office of Management and Budget, Human Resource Management
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Responses due by 12:00 noon (Eastern Standard Time), December 22, 2008

Request for Information

INTRODUCTION
The Delaware Office of Management and Budget (OMB) is requesting information from prospective vendors for a statewide talent management system (TMS) and the components thereof. The purpose is to gather information concerning state-of-the-art talent management products and their costs for planning purposes and to inform future decision-making by OMB.

OVERVIEW OF ORGANIZATION
Currently there are approximately 17,000 employees working in merit and exempt state agencies in Delaware, not including Higher Education or School Districts. Agency size varies from the largest, Department of Health and Social Services with over 5,000 employees, to very small boards or commissions with only a few employees. Most of the larger agencies have a training department, and there is also a central statewide training and organization development section operated out of the Office of Management and Budget's Human Resource Management (HRM) section.

PROJECT OVERVIEW
The integration of HR processes through the development or purchasing of a TMS will allow integration of training administration, competency management, performance management, workforce/succession planning, and career development. The TMS will provide HRM with an increased capability to serve our state agencies and state government by enabling us to gather, track, and integrate data that is critical to effectively manage the State's human resources. The TMS will replace HRM's archaic training tracking system so that all state merit and merit-comparable employees (at a minimum) can easily enroll in state training and can have their complete training record easily available both to them and their supervisor. Numerous state agencies have requested this system, and we will work to address the need from a statewide perspective. Before finalizing our design, we must consider costs.

This RFI requests that Software as a Service (SaaS) vendors provide brief descriptions and cost estimates for any existing vendor products/systems or any third-party integrations which meet each of the modules described below. This RFI is being issued to obtain information only and is not intended to result in contracts or vendor agreements with any respondent. Respondents to this RFI will not be excluded from eligibility to participate in any future requests for proposals (RFPs) based on their decision to respond to this RFI or on the content of their responses to this RFI.

REQUIREMENTS
A new automated system is needed to meet the following business objectives of the organization:
- Lead comprehensive and integrated strategic workforce planning efforts across state agencies: In order to effectively identify current and future human resource needs, it is necessary to automate the collection and reporting of workforce gaps, critical positions, and employee career development. The system must be able to integrate this data with associated job skills and competencies necessary for performing those jobs and identify appropriate training to provide employees with the necessary skills.
- Continuously train and develop the state's workforce: A system that integrates actual job skills and competencies associated with each job class can increase the impact of training on job performance. Employees will also be able to identify which job skills and competencies are necessary in order to prepare them to compete for positions that can advance their career with the State of Delaware.
- Align statewide training with performance management: By integrating these processes in an automated system, learning can be directly tied to strategic initiatives for succession planning and employee performance and can accelerate the process of closing critical skills gaps. A statewide training solution that is accessible by all employees, managers, and training administrators will simplify the administration of learning programs within the state. A system that integrates learning, performance and competency management can collect and automate employee performance data and recommend actionable learning and development solutions.

SYSTEM COMPONENTS

1. Learning Management

The Learning Management System must be able to support the following distinct levels of usage:

Employee: at this level an individual employee must be able to:
a. See his/her individual training record
b. Access customized training schedules and class calendars of training events available from Statewide Training programs as well as those available from his/her department or division
c. Access course information on every available course (including course description, times, locations, costs, prerequisites, and special instructions)
d. Register for classes on-line and use an electronic workflow to forward registration through a predefined approval process
e. Access and complete e-learning courses from any computer connected to the state network with the option to expand to the World Wide Web.

Management: includes individuals with responsibility for overseeing the training and development of their workforce. At this level, a member of management must be able to:
f. Perform all the functions listed under the Employee level above
g. Submit, approve, edit, or cancel registrations for individual employees or groups (batch processing)
h. Receive requests for training from employees and be able to approve or deny those requests electronically (including the ability to route requests through other levels of management as required)
i. Conduct reporting functions on his/her workforce to include monitoring individual training records (including attendance and assessment scores) and collective and aggregate reports on the various components of the data base relevant to his/her workforce
j. Recommend courses or certificate programs to employees based on job title, classification, or performance management
k. Monitor financial expenditures and workforce commitments for training and development of his/her unit

Training Administrators: Training administrators create, administer, and manage training programs for state of Delaware employees. They may have responsibility for statewide, department, division, and/or special purpose programs. Training administrator groups will have a variety of employees who will have roles and responsibilities for data entry; course creation, registration, and closeout activities; e-learning administration; and participant management. Training administrators must be able to:
l. Perform all functions listed under Basic Employee and Manager levels
m. View and print individual training records
n. Create and modify learning activity properties (includes course title, description, type, size, instructors, prerequisites, length)
o. Track all modifications to course properties
p. Add notes/comments to each course offering
q. Restrict course viewing based on organization or program enrollment
r. Assign system defined competencies to courses
s. Manage overall schedule of classes and training resources (including training rooms, equipment, instructors, and materials)
t. Publish course schedule/catalog on website
u. Send notification and reminder emails with any required attachments
v. Track and enter attendance status for all participants
w. Issue printed certificate of completion
x. Manage and override (when necessary) automated waitlist functions
y. Close out classes
z. Send out customized email communications to participants and instructors
aa. Create and administer e-learning classes without vendor assistance
bb. Create and modify instructor profiles

cc. Create and generate both ad hoc and standard reports that can be exported into a variety of file formats (Excel, Word, HTML, CSV, Text)

dd. Control access to LMS functions/data based on organizational identity (department, division) and roles within the organization

ee. Track course and instructor evaluation results

ff. Create and edit certificate program curriculum

gg. Track status of program assignments/activities (course notes, projects, case studies, etc) and be able to add comments for each item

hh. Learning activities included in the curriculum may have different durations, start, and end dates which are calculated by the system for each learner based on when the curriculum was assigned to them.

ii. Notify program participants of updates/changes to program-related learning activities

In addition, the learning management system must also meet the following basic requirements:

jj. Automatically archive employee data when employee file becomes inactive

kk. Minimum of four layers of organizational tracking per employee (supervisor, division, agency, and statewide)

ll. Interaction with Outlook or system calendar

mm. Learning activities include, but are not limited to: single day and multiple day courses, conferences, online courses, certificate programs

2. Competency Management

The Competency Management System must be able to support the following:

a. Competency Library - maintain behavioral and technical competencies and definitions
b. Handle proficiency scales that can be assigned to each competency
c. Assign competencies to related training or other development opportunities
d. Support development and maintenance of competency roles
e. Assign competencies to categories
f. Track and report on competencies by position or job classification
g. Contain spelling and legal checker
h. Support data integration from the State's HRIS system
i. Integrate with all other modules
j. Role-based security that permits only authorized individuals to view and/or edit information
k. Create and generate both ad hoc and standard reports that can be exported into a variety of file formats (Excel, Word, HTML, CSV, Text)

3. Performance Management

The Performance Management System must be able to support the following:

a. Competency-based
b. Maintains performance documentation by employee and by supervisor
c. Provides documentation of progress
d. Review is based on performance plan
e. Provides probationary, interim, and annual ratings
f. Allows additional raters
g. Includes employee self-assessment
h. Provides customized rating scales and descriptions
i. Provides 360 capability
j. Connects ratings to competency scales and identifies gaps
k. Communication workflow including email reminders
l. Create and generate both ad hoc and standard reports that can be exported into a variety of file formats (Excel, Word, HTML, CSV, Text)

m. Desired:
Suggested performance review language by competency (writing assistant, coaching advisor, and legal scanner)

4. Workforce/Succession Planning

The Workforce/Succession Planning System must be able to support the following:

a. Organizational chart functionality
b. Identify critical positions by job classification with its associated required competencies
c. Supports customized candidate searches - keyword search for specific credentials, experience, competencies, etc
d. Identify and assess current talent pools by position or classification
e. Supports complete individual profiles (resumes/CV's)
f. Calculates an individual's fit or readiness for different positions or classifications
g. Calculates bench strength for different positions or classifications
h. Includes a "9 box" to portray candidates on the dimensions of performance and competence (or potential) - Interactive performance matrix
i. Coding and reporting on protected or special needs groups, such as females, minorities, and/or retention risks
j. Displays succession plans graphically
k. Create and generate both ad hoc and standard reports that can be exported into a variety of file formats (Excel, Word, HTML, CSV, Text)

5. Career Development

This module would enable employees to take responsibility for their own career management and develop those needed skills as appropriate while allowing the organization to identify required future skills needs. The module would include:

a. Employee profile
b. Exploration tool for employees to explore alternative roles including gap analysis of skills/competencies required for selected positions or job classifications
c. Provides customized training plan for participant
d. Supports competency-based individual training and development plan. Plans can be pre-populated with competencies of employee's current position and dynamically updated with change in role
e. Suggests appropriate developmental jobs for employee based on final target job
f. Provides suggestions on training or resources based on competency being developed
g. Must be integrated with other key Human Resource initiatives such as Performance Management and Workforce/Succession Planning
h. Job preferences identified by employees can be incorporated into succession planning to align interest with open positions

NOTE: Compensation and Recruitment Modules are not needed at this time

Specific Information Requested

Vendors are requested to submit the following information.

Organization Information	
Company Name	
Parent Company Name (if applicable)	
Address	
City, State and Zip	
Date of incorporation	
Telephone	
Web site address	
RFI Contact Information	
Name	
Title	
Address	
City, State and Zip	
Telephone	
E-mail address	

Products and Services:
1. Include each product or service that addresses one or more modules of our system needs.
2. For each component/module of the system, please provide the following information:
   a. Brief description and links to online demonstrations or more detailed descriptions
   b. Number of years offered
   c. States, if any, that are currently using the module
   d. Cost estimate: either cost per employee or cost per module (17,000 employees)
   e. Description of what the cost estimate includes and other major related costs not included in the estimate

Please complete the following table for each module (highlighted and bolded in blue):
1. Do you have the module as part of your system? (Answer Y, N)
2. Does your system meet the high-level requirement as included in the RFI? (Answer Y, N)
3. Please briefly describe how your system meets this requirement.

Module/Requirements	Have Module (Y or N)	Meets Requirement (Y/N)	Cost (answer for module only)	Briefly describe how the system meets this requirement
1. Learning Management				
Employee Level:				
a. See his/her individual training record				
b. Access customized training schedules and class calendars of training events available from Statewide Training programs as well as those available from his/her department or division				
c. Access course information on every available course (including course description, times, locations, costs, prerequisites, and special instructions)				
d. Register for classes on-line and use an electronic workflow to forward registration through a predefined approval process				
e. Access and complete e-learning courses from any computer connected to the state network with the option to expand to the World Wide Web.				
Manager Level:				
f. Perform all the functions listed				

	under the Employee level above			
g.	Submit, approve, edit, or cancel registrations for individual employees or groups (batch processing)			
h.	Receive requests for training from employees and be able to approve or deny those requests electronically (include the ability to route requests through other levels of management as required)			
i.	Conduct reporting functions on his/her workforce to include monitoring individual training records (including attendance and assessment scores) and collective and aggregate reports on the various components of the data base relevant to his/her workforce			
j.	Recommend courses or certificate programs to employees based on job title, classification, or performance management			
k.	Monitor financial expenditures and workforce commitments for training and development of his/her unit			
Training Administrator Level:				
l.	Perform all functions listed under Basic Employee and Manager levels			
m.	View and print individual training records			
n.	Create and modify learning activity properties (includes course title, description, type, size, instructors, prerequisites, length…)			
o.	Track all modifications to course properties			
p.	Add notes/comments to each course offering			
q.	Restrict course viewing based on			

	organization or program enrollment			
r.	Assign system defined competencies to courses			
s.	Manage overall schedule of classes and training resources (including training rooms, equipment, instructors, and materials)			
t.	Publish course schedule/catalog on website			
u.	Send notification and reminder emails with any required attachments			
v.	Track and enter attendance status for all participants			
w.	Issue printed certificate of completion			
x.	Manage and override (when necessary) automated waitlist functions			
y.	Close out classes			
z.	Send out customized email communications to participants and instructors			
aa.	Publish and administer e-learning classes without vendor assistance (including publishing e-learning courses created with ProForm or similar software without vendor assistance)			
bb.	Create and modify instructor profiles			
cc.	Create and generate both ad hoc and standard reports that can be exported into a variety of file formats (Excel, Word, HTML, CSV, Text)			

dd. Control access to LMS functions/data based on organizational identity (department, division) and roles within the organization			
ee. Track course and instructor evaluation results			
ff. Create and edit certificate program curriculum			
gg. Track status of program assignments/activities (course notes, projects, case studies, etc) and be able to add comments for each item			
hh. Learning activities included in the curriculum may have different durations, start, and end dates which are calculated by the system for each learner based on when the curriculum was assigned to them.			
ii. Notify program participants of updates/changes to program related learning activities			
Additional Requirements:			
jj. Automatically archive employee data when employee file becomes inactive			
kk. Minimum of four layers of organizational tracking per employee (supervisor, division, agency, and statewide)			
ll. Interaction with Outlook or system calendar			
mm. Learning activities include, but are not limited to: single day and multiple day courses, conferences, online courses, certificate programs			

Module/Requirements	Have Module (Y or N)	Meets Requirement (Y/N)	Cost (answer for module only)	Briefly describe how the system meets this requirement
2. Competency Management Module				
a. Competency Library - maintain behavioral and technical competencies and definitions				
b. Proficiency scales that can be assigned to each competency				
c. Assign competencies to related training or other development opportunities				
d. Develop and maintain competency role				
e. Assign competencies to categories				
f. Track and report on competencies by position or job classification				
g. Spelling and legal checker				
h. Support data integration from ERP or outside system				
i. Integration with all other modules				
j. Role-based security that permits only authorized individuals to view and/or edit information				
k. Create and generate both ad hoc and standard reports that can be exported into a variety of file formats (Excel, Word, HTML, CSV, Text)				

Module/Requirements	Have Module (Y or N)	Meets Requirement (Y/N)	Cost (answer for module only)	Briefly describe how the system meets this requirement
3. Performance Management				
a. Competency based				
b. Maintains performance documentation by employee and by supervisor				
c. Provides documentation of progress				
d. Review is based on performance plan				
e. Provides probationary, interim, and annual ratings				
f. Allows additional raters				
g. Includes employee self assessment				
h. Provides customized rating scales and descriptions				
i. Provides 360 capability				
j. Connects ratings to competency scales and identifies gaps				
k. Communication workflow including email reminders				
l. Create and generate both ad hoc and standard reports that can be exported into a variety of file formats (Excel, Word, HTML, CSV, Text)				

Module/Requirements	Have Module (Y or N)	Meets Requirement (Y/N)	Cost (answer for module only)	Briefly describe how the system meets this requirement
m. Suggested performance review language by competency (writing assistant, coaching advisor, and legal scanner)				
4. Workforce/Succession Planning				
a. Organizational chart functionality				
b. Identify critical positions by job classification with its associated required competencies				
c. Supports customized candidate searches - keyword search for specific credentials, experience, competencies, etc.				
d. Identify and assess current talent pools by position or classification				
e. Supports complete individual profiles (resumes/CV's)				
f. Calculates an individual's fit or readiness for different positions or classifications				
g. Calculates bench strength for different positions or classifications				
h. Includes a "9 box" to portray candidates on the dimensions of performance and competence (or potential) - Interactive performance matrix				

Module/Requirements				
i. Coding and reporting on protected or special needs groups, such as females, minorities, and/or retention risks				
j. Displays succession plans graphically				
k. Create and generate both ad hoc and standard reports that can be exported into a variety of file formats (Excel, Word, HTML, CSV, Text				

Module/Requirements	Have Module (Y or N)	Meets Requirement (Y/N)	Cost (answer for module only)	Briefly describe how the system meets this requirement
5. Career Development				
a. Employee profile				
b. Exploration tool for employees to explore alternative roles including gap analysis of skills/competencies required for selected positions or job classifications				
c. Provides customized training plan for participant				
d. Supports competency-based individual training and development plan. Plans can be pre-populated with competencies of employees current position and dynamically updated with change in role				

e.	Suggests appropriate developmental jobs for employee based on final target job			
f.	Provides suggestions on training or resources based on competency being developed			
g.	Must be integrated with other key Human Resource initiatives such as Performance Management and Workforce/Succession Planning			
h.	Job preferences identified by employees can be incorporated into succession planning to align interest with open positions			

Response Process and Timeline

1. Responses should be submitted electronically in MS Word-readable, PDF and/or MS Excel formats to Cheryl.Rice@state.de.us.
2. Questions related to the RFI should be submitted via e-mail to Cheryl Rice at Cheryl.Rice@state.de.us. Questions should be clearly and succinctly phrased and a return e-mail address should be provided. Requestor's name, title and organization should also be provided.
3. Responses are requested no later than **Monday, December 22, 2008** at noon, Eastern Standard Time. Organizations responding after this date will not be excluded from participating in any future requests for either information or proposals; however, their responses to this RFI will be reviewed only as time permits.
4. Upon receipt the responses will be reviewed by **the TMS Project Team**. If it is determined that additional information is needed from the vendor to clarify the solution being proposed, the vendor may be contacted for further information.

Confidentiality of Documents

Responses shall not contain any information that is proprietary in nature. The State of Delaware is a public agency as defined by state law and, as such, it is subject to the Delaware Freedom of Information Act, 29 *Del. C.* Ch. 100. Under the law, all records are public records (unless otherwise declared by law to be confidential) and are subject to inspection and copying by any person. Respondents are advised that after responses are received and reviewed by the Task Force, the contents will become public record and nothing contained in the response will be deemed to be confidential.

Disclaimer

This RFI is issued solely for information and planning purposes only and does not constitute a solicitation. Responses to the RFI will not be returned. Responses to this notice are not offers and cannot be accepted to form a binding contract. Respondents are solely responsible for all expenses associated with responding to this RFI.